

LBNL – PROCUREMENT STANDARD PRACTICES

Section: 4 Administrative Matters

Subject: 4.1 **Interactions With Requesters**

PURPOSE:	This standard practice (SP) describes the procedures for effectively interacting with and informing requesters of subcontract issues throughout the procurement process.
POLICY:	Procurement specialists will work closely with requesters to exchange information necessary to process their subcontracts, and keep requesters notified of significant changes.
SCOPE:	This SP applies to all subcontracts.
PROCEDURES:	
Expectations	<p>Procurement specialists are expected to maintain close working relationships with requesters and be aware of and responsive to their programmatic requirements and budgetary constraints. The procurement specialist will review all purchase requisition documentation (e.g., specification, statement of work, sole-source justification, etc.) to determine whether the description of work, specification, and/or statement of work:</p> <ul style="list-style-type: none">• Adequately describes the item to be purchased or the work to be performed taking into consideration such factors as the estimated cost or price of the acquisition, the nature and/or complexity of the work to be performed, type of subcontract contemplated, and whether the requirement will be competitive or sole-source;• Addresses the specific deliverables to be provided; and• Considers the need for quality assurance, safety, security, or other requirements. <p>If questions exist or documentation is found to be inadequate, the procurement specialist must work with the requester to ensure that all questions, concerns, and/or deficiencies are resolved prior to solicitation or award of the subcontract.</p>
Acquisition Planning	For proposed subcontracts expected to exceed \$500,000, the procurement specialist will develop an acquisition plan in accordance with SP 7.1, <i>Acquisition Planning – General</i> .
Changing Requirements	Any substantive changes , such as making a substitution, competing a potential sole source, modifying specifications, significantly increasing the cost or price of an order, or extending the due date , must be discussed with the requester prior to proceeding with the change .
Other Deviations From Requirements	The requester must be notified when proposals differ substantially from other stated requirements of the solicitation (e.g., delivery schedules, specifications, etc.). The requester's concurrence with any deviations in requirements must be documented before a subcontract is awarded.

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Other Phases

After award of the subcontract, any changes of a substantive nature proposed by the subcontractor that could have an effect on subcontract costs or performance must be accepted by the requester.

RESPONSIBILITIES:

Procurement Specialist

The procurement specialist will:

- Work with the requester to ensure that purchase requisition documentation is adequate and sufficient;
- Develop an acquisition plan for proposed subcontracts expected to exceed \$500,000 in accordance with SP 7.1, *Acquisition Planning – General*;
- Contact the requester and coordinate any changes to a subcontract;
- Ensure that subcontract costs exceeding the original estimate are acceptable to the requester; and
- Notify and work with the requester to resolve any deviations from subcontract requirements.